



**Enterprise Service Desk and Managed Desktop
Support
RFP #28203-JW**

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Responses Due: 2:00:00 p.m. CT, August 1, 2016

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DEFINITIONS

The following definitions of terms shall apply, unless otherwise indicated:

Abandon Rate - the number or percent of Calls in which the caller disconnects before an agent answers their Call.

Abandon Rate for Emails - the abandon rate for emails is tracked via our Automated Call Distribution (ACD) software. While emails never are truly “abandoned” from the ACD system, agents are given a certain timeframe to answer an email and the system will abandon the email from the agent if that is not met.

ACD - Automatic Call Distribution system.

AHA - The average handling time – the handling time includes the time the agent is actually talking to the Customer, the amount of time required to complete the Cherwell ticket, and route it to the appropriate queue (and page additional personnel if necessary).

Agency - The Department of Administration, Division of Enterprise Technology and agencies supported by the IT Service Desk Call Center and IT Desktop Services. IT Service Desk Call Center is a 24x7x365 service desk, providing support for DET’s enterprise services such as e-mail, network and cloud/server. Agency Customers include all State Agencies, (with the exception of DFI and DOJ). IT Desktop Services are available 7:00 AM–5:00 PM Monday–Friday and supports Department of Administration (DOA), Small Agencies (SASI), and Department of Safety and Professional Services (DSPS).

Agency Event - An IT event that affects a single agency’s DET-managed network or server infrastructure.

ASA - The average speed of answer - (average time a caller waits in queue before being greeted by an agent).

Average Overall Service Level - A measurement defined by a standard Average Speed of Answer (ASA) that is utilized for Calls (30 seconds or less) and emails (5 minutes or less).

BCN - BadgerNet Converged Network

Bundled Proposal – A responsive Proposal that includes all categories of this RFP.

Call - A voice-to-voice communication via phone (or headset).

CARES - Client Assistance for Reemployment and Economic Support.

CCA - Contact Center Anywhere; current Automatic Call Distributing software used.

Cherwell – The Resource Management System used by the Agency.

CI - Configuration Item current asset management system.

CJIS - The Criminal Justice Information Services Division

Client – The individual contacting the service desk for assistance.

CMDB – Configuration Management Database

Contact - Any inbound or outbound Interaction from a customer or automated system that requires action by the agent.

Contract - the written agreement between the State and Contractor(s) that covers the delivery of work to be performed subsequent to this RFP.

Contract Administrator - The individual assigned by the State to administer and oversee day-to-day operational matters of the Contract.

CPE - Customer Premises Equipment

Customer - The specific State Agency that pays the service desk for support.

Data Security Escorting Services – Escorting visitors in the data center and monitoring their activities.

DET – Division of Enterprise Technology

DL - Distribution List

DOJ – Wisconsin Department of Justice

Enterprise - Enterprise technology, information, and infrastructure refers to the concept of information technology (IT) resources and data that are shared across an enterprise. (The term "enterprise" minimally means across a sponsor's entire organization (*i.e.* corporate versus department level, but it can just as easily be cross-organizational such as multi-agency or Joint/DoD level). Embodied in this concept are technical efforts such as infrastructure engineering for building, managing, and evolving shared IT; IT or infrastructure operations for administering and monitoring the performance of the IT service being provided to the enterprise; IT services management; and information services management.

ESD - Enterprise Service Desk

Enterprise Event - Any IT service that has become nonfunctional or degraded to the point of creating a significantly negative impact on Customer's business functions. Examples: *An application or service is unavailable. *Systems performance degraded to the point of severe negative Customer impact or a direct wide-range citizen impact or impacts multiple State agencies.

eWISACWIS - An application Wisconsin Statewide Automated Child Welfare Information System (eWiSACWIS) which maintains detailed case information used by local child welfare agency staff for child welfare purposes, and to which only appropriate child welfare agency staff and other authorized users have access to as provided under applicable law, including but not limited to Wisconsin Statutes, Sections 48.981, 48.78, and 48.396.

FedRAMP - The Federal Risk and Authorization Program - a risk management program that provides a standardized approach for assessing and monitoring cloud computing services among federal agencies.

FERPA - Family Educational Rights and Privacy Act of 1974 - a federal law that pertains to the release of and access to educational records.

FIPS - Federal Information Processing Standards - publicly announced standards developed by the United States federal government for use in computer systems by non-military government agencies and government contractors.

FISMA – The Federal Information Security Management Act - United States legislation that defines a comprehensive framework to protect government information, operations and assets against natural or man-made threats.

High Severity Incident - a Category 1 (Unauthorized Access), 2 (Denial of Service), or 3 (Malicious Code) incident by the US-Cert: <http://www.us-cert.gov/government-users/reporting-requirements>.

HOD - Host on Demand application allows users within and outside of the State Network access to the DOA mainframe through any Java-enabled Web browser.

IAM - Identity and Access Management

Interaction - An inbound or outbound Call, or inbound email, received and routed through the Automated Call Distribution (ACD) software.

ITIL - Information Technology Infrastructure Library.

IRS – The Internal Revenue Service

Level 0 Support - including but not limited to the following:

- Receive contacts from Customers.
- Collect pre-defined information from Customer to fully understand and triage problems.
- Log contacts in Cherwell as required by the State.
- Open problem tickets and route to appropriate queues.
- Password resets (or any resolved incidents) are completed and logged as “resolved,” then reviewed and closed by the responsible agency or automatically in Cherwell system after 3 days.
- Customer receives email from Cherwell stating “resolved” (allows Customer to respond if needed).

Level 1 Support - including but not limited to the following:

- Monitor queues and perform initial problem verification, contact the person who reported the problem.
- Verify ticket information, assess priority, and record any additional information about problem.
- Record error messages, activity logs, and complete associated templates.
- Manage the first level problem queue.
- Record any additional incident identification information into Cherwell.
- Take and record appropriate actions to resolve problems.
- Ensure agency standards, practices, and procedures are being followed.
- Perform basic dial-in troubleshooting.
- Manage Call escalation, tracking, and resolution.
- Assist new customers with logging into the network for the first time.
- Any issue unable to be resolved at Level 0.

Level 2 Support - including but not limited to the following:

- Install and uninstall software, hardware, computers, and peripherals.
- Image and re-image new and existing computers and laptops.
- Add and remove printers.
- Resolve virus problems (for initial triage; if spreading goes to Security).
- Service Level Agreement (SLA) management.

- IT needs related to relocations and IT deployments.
- Support needs that require work with hardware and software vendors to resolve issues.
- Asset management.
 - Receipt of new equipment and applying the asset tag to these assets.
 - Entering assets into the asset spreadsheet, and recording inventory data. The data will later be uploaded into Cherwell for tracking.
 - Assets will then be managed in an automated fashion until retirement.
 - Retirement includes technically wiping the device and deleting the entry from active directory. The asset is then placed with the inventory moving to SWAP, or other disposal/e-recycling entity.
 - Once the asset is sent to SWAP, the asset needs to have a status update to “retired” within Cherwell.
- Any issue unable to be resolved at Level 0 or Level 1.

LPARS - Logical Partitions

Monitoring Alerts – Automated system(s) used to generate alerts based on specified criteria, ex: What’s Up Gold (WUG), Storage Alerts and HP Open View (HPOV).

NIST – National Institute of Standards and Technology.

PCI – The Payment Card Industry Data Security Standard - a set of requirements designed to ensure that ALL companies that process, store, or transmit credit card information maintain a secure environment. Essentially any merchant that has a Merchant ID (MID).

Project Manager - The individual assigned by the Proposer responsible for managing contractual issues related to this RFP.

Resolved Contact – A user contact with the ESD or IT managed desktop support services provider to report an incident or request support, where the requested service or incident ticket has been successfully resolved and deemed closed to the satisfaction of the user and the Agency, and no further action is necessary to correct the issue.

RMS - Resource Management System referred to as Cherwell in document.

SLA - Service Level Agreement

State Holidays – New Year's Day (January 1), Martin Luther King Jr.'s Birthday (Third Monday in January), Memorial Day (Last Monday in May), Independence Day (July 4), Labor Day (First Monday in September), Thanksgiving Day (Fourth Thursday in November), Christmas Eve Day (December 24), Christmas Day (December 25), New Year's Eve Day (December 31)

WAMS - Web Access Management System

WILMS - Wisconsin Logon Management System

WUG - “WhatsUpGold” - a tool used to monitor various aspects of network devices – monitoring policies cover a variety of things including a ping (up/down), disk space/memory/CPU utilization, etc.

1.0 GENERAL INFORMATION

1.1 Introduction

The purpose of this Request for Proposal (RFP) is to provide interested parties with information to enable them to prepare and submit a Proposal for a managed services single-point-of-contact, IT Enterprise Service Desk (ESD) call center as well as managed desktop support services. Proposers have the option of responding to one or both categories of service.

The ESD is the gateway to DET services and support for citizens and State of Wisconsin agencies and provides Levels 0-2 IT service desk support and monitoring services. The Agency's desktop services group provides Level 2 Desktop Support to DOA divisions and attached boards. They resolve local desktop, hardware, software, telecommunication device, and audio visual issues. The Department of Administration (DOA), Division of Enterprise Technology (DET), as represented by the DOA, State Bureau of Procurement, intends to use the results of this solicitation to award a Contract for such services.

1.2 Scope and Objectives

The Agency is requesting managed IT ESD and desktop services solutions to assist with the provision of a single point of contact for each category of service, providing IT Service Management support for the enterprise, including timely resolution of Customer's incidents.

The Agency's objective is to gain operational efficiencies and scalability by implementing a managed service of this nature. The Agency is also expecting the selected Proposer(s) to utilize the IT Infrastructure Library (ITIL) model, deliver a positive customer experience, and ensure continued customer satisfaction by utilization of surveys that can be compared to existing baseline.

The awarded Proposer(s) will be responsible for providing network connectivity with appropriate bandwidth for the purpose of providing contracted services. The selected Proposer(s) will be responsible for acquiring connectivity with the Agency's network and will work with the Agency network and security teams to establish such connections using Agency security and network standards.

Category 1: IT Service Desk Call Center solution includes:

- Incident and service request logging, routing, and reporting in Cherwell based upon defined policies/procedures.
- Password resets and account management.
- Management of Customer incident phone Calls and e-mails.
- Enterprise triage, including but not limited to:
 - Gathering triage information from caller/Customer.
 - Checking network availability and connectivity via monitoring tools.
 - Checking server availability and connectivity via monitoring tools.
 - Checking application availability and connectivity from DET, if applicable.
- Routing/escalating incidents to the appropriate DET support group, if applicable.
- Service Request Management.
- BadgerNet Converged Network (BCN) support.
- Enterprise Event communications.
- Agency Event communications.

- Continually aligning and re-aligning services to accommodate the changing business needs to increase service performance for the State of Wisconsin Customers based upon the results of service reviews and process evaluations. For example, a problem management process utilized to perform root cause analysis aimed at incident avoidance.
- Maintain a comprehensive customer survey review process to ascertain performance against the critical success factors (e.g. customer satisfaction).
- Provide an up to date knowledge database to include knowledge articles, phone scripts, application support material, etc., and ensure knowledge transfer to maintain the services and support for first touch resolution. Additionally provide knowledge required in becoming fully familiar with the State of Wisconsin support processes and procedures, as well as the relevant support materials. This includes being responsible for providing pertinent training materials in the event of an early transition of support to internal resources.
- Ensure that all staff directly involved with the ESD are adequately trained and fully staffed to provide 24X7X365 support at Proposer's location.
- Utilize service delivery dashboards to present metrics on a daily, monthly, quarterly, and yearly basis.
- Consolidation of current contact center staffing suppliers by creating singular managed services contract.

The Agency may expand services in the future; therefore, Proposers possessing scalability resources are desired. Specifically, the Agency may wish to add during the Contract term the following services:

- 1) Mainframe Monitoring-Data Center operations, mainframe computing, storage, security and access
- 2) Data Center security escorting services to physically escort and monitor activities of visitors

Category 2: IT Desktop Services solution from Proposers is requested to include the following:

- Use of IT Infrastructure Library (ITIL) aligned process model.
- Provide an up to date knowledge database to include knowledge articles, phone scripts, application support material, etc., and knowledge transfer to maintain the services and support for first touch resolution. Additionally provide knowledge required in becoming fully familiar with the State of Wisconsin support processes and procedures, as well as the relevant support materials. This includes being responsible for providing pertinent training materials in the event of an early transition of support to internal resources.
- Asset management assistance, including:
 - Lifecycle replacement and asset management assistance of hardware and software (in the respective CMDB).
 - Provide inventory management for tracking users, location of the equipment, etc.
 - Assistance with hardware and software requests including maintenance of enterprise hardware specifications and research which may be used in recommendations for purchasing options.
- Device support including break fix services for desktop, laptop, mobile device, smart phone, IP phone, audio visual, fax/copiers, and the maintenance of an inclusive knowledge base of common resolution techniques for each to include Windows and iOS support.
- Engineering to include imaging, application packaging development and deployments, new operating system planning, and office document management.
 - The Agency currently utilizes SCCM for packaging and deploying device updates. Patches are deployed monthly, and the Agency uses an early adopters group to assist with testing. The Agency currently has around 100 applications deployed through SCCM. A small percentage of Customers use Citrix. Updates are made via batch files, and VMware Horizon is presently being researched as a possible VDI tool.

- Regression testing of new patch releases to the organization. This may be performed remotely.
- Process Control including:
 - Reporting by defined categories to assist management in assessing success, stress points, and improvement opportunities, including customer satisfactions surveys.
 - Assist DET with license management on all software deployments, and license management for the organization; inclusive of establishing workflows to expedite approval prior to installation.
 - Software installation.
 - Act as intermediary between Customer and cloud provider.
 - Budget approval to guide requests through the Agency's procurement process by tying into the Agency's existing workflows in order to execute the proper groups and final approvals.
 - Customer Service Team Management of service with reviews on a quarterly or semi-annual basis.
 - Escalation procedures in place for priority business.

1.2.1 Primary Objectives

In addition to the procurement of ESD and desktop support services, the primary objectives of this solicitation and the subsequent Contract include:

- 1) Maintain and/or improve service levels described in section 1.3.
- 2) Leverage a scalable service solution that can handle influxes as a result of unplanned activities or growth. Examples can include, but are not limited to, the installation or implementation of a new and/or existing application/platform.
- 3) Provide operational efficiencies and growth opportunities in the provision of both services.

1.3 Background and Current Operations

Category 1: IT ESD Call Center Solution

DET provides infrastructure and application support, development, architecture, and engineering to 72 State agencies and boards. The current footprint contains over 40,000 Client accounts, 1,026 virtual servers, and 438 physical servers both in a centralized data center and in remote locations across the State of Wisconsin.

Today, DET's ESD acts as a second-tier service desk, taking ownership of incidents from Agency service desks, when the root cause for incidents is determined to be attributed to the services provided by DET. For example, the ESD helps citizens with account maintenance/password issues for the following: mainframe public logon IDs, IAM, WILMs, NAM and WAMS. The ESD is also responsible for monitoring and incident ownership of incidents/outages related to the BCN and monitoring z/OS operating systems LPARS. The Service Request Manager function is also a part of the ESD and is responsible for the receipt, routing, reporting, and escalation of agency-submitted service requests.

The State currently uses the Cherwell Service Management software. Cherwell is the State's application for managing IT assets, problems, changes, service requests, and financial tracking through the enterprise. Cherwell is a Client/server application with the server portion and data residing at Femrite Data Center. Initial training by the State to the selected Proposer on the use and operation Cherwell may be provided upon request. The agency is currently utilizing the following Cherwell modules: Incident, Asset, Service Request, and Change. Should the tool change, coordination of additional training will be completed by the State. The State will maintain control of its own licenses. As such, the selected Proposer will not be obligated to pay for Cherwell licensing.

The DOA/DET ESD provides a IT service desk staffed by agents who respond to contacts initiated via phone, and email from State Agency personnel as well the general public (password resets). Agents work closely with other agencies' service desks to resolve enterprise issues. Key business drivers include standardized and streamlined service level

management, improvements to service efficiencies, consistently keeping Customers informed of their tickets' progress, and advising on workarounds.

The State seeks to initiate a Contract with a Proposer(s) who has proven experience in providing highly responsive service to Customers, have demonstrated innovative delivery of service desk functions, and can deliver service at or above the below current metrics as outlined in Section 4.1.2.

Cumulative Monthly Averages (All Times Listed in Minutes:Seconds):

- Calls = 7,243; Average Speed of Answer 1:11; Average Handling Time 5:52
- Email = 4,463; Average Speed of Answer 2:43; Average Handling Time 5:23
- Chat (Instant Message) = Not currently offered, Proposer must have the capability of providing this service
- Monitoring Alerts= 582
- Total Contacts = 12,288
- Average Abandon Rate (includes email and phone contacts) = 8%
- Average Overall Service Level (includes email and phone contacts) = 78%

A major challenge the Agency encounters is managing agent churn within the confines of the current contract, where the current service desk is staffed almost completely by independent contractors selected through the State's vendor managed system (VMS). Due to current staff limitations along with the extended (approximately 6 weeks) training period for new agents, considerable time and money are invested with every new hire and the current system adds additional time. These factors make managing agent turnover difficult and inefficient. DET believes using a Managed Services Provider (MSP) would mitigate this issue as well as add other efficiencies to daily operational tasks. The Agency is interested in a managed services solution to provide the entire current IT service desk operation with the potential for growth in both services provided and contact volume handled.

Category 2: IT Managed Desktop Support Services Solution

The State has Customer sites and known assets located in all 72 counties. The Agency's desktop services group provides Level 2 Desktop Support to DOA divisions and attached boards. They resolve local desktop, hardware, software, telecommunication device, and audio visual issues. Their current hours of service are 7:00 AM–5:00 PM Monday–Friday, excluding State Holidays. However, hours can be extended for high priority/emergency services needed.

Cumulative Monthly Averages (All Times Listed in Minutes:Seconds):

- Calls = 618; Average Speed of Answer 0:34; Average Handling Time 5:52 (275 Level 2 Calls)
- Email = 130; Average Speed of Answer 2:43; Average Handling Time 5:23
- Chat (Instant Message) = Not currently offered, Proposer must have the capability of providing this service
- Cherwell Incidents = 540 and Cherwell Service Requests = 150
- Desktop Support Moves = 20 devices (Cherwell service requests. These are typically within the same building, occasionally within the same city, rarely between cities, and they generally involve a single device.)
- PC replacements/New Deployments/Operating system upgrades/Re-images = 70 (Cherwell service requests.)
- Total Contacts = 1,528
- Average Abandon Rate (includes email and phone contacts) = 9.12%
- Average Overall Service Level (includes email and phone contacts) = 85.66%

Specifically Included:

- Gathering additional triage information from callers/Customers
 - Checking network availability and connectivity via monitoring tools
 - Checking server availability and connectivity via monitoring tools

- Checking application availability and connectivity from the Agency, if applicable
- Route/escalate incidents to the appropriate DET support group, if applicable
- Equipment checkout services and related maintenance
- Technical assistance with conference rooms in the DOA building
- Provide equipment access to DET for the purpose of testing new systems and equipment
- Monthly service metrics dashboards to provide assistance
- End –user software support

1.4 Procuring and Contracting Agency

This RFP is issued by the DOA, State Bureau of Procurement, which is the sole point of contact for the State of Wisconsin during the selection process. The person responsible for managing the procurement process is Jim Witecha. The contract resulting from this RFP will be administered by the DOA, DET. The Contract Administrator will be determined during contract negotiations.

1.5 Clarifications and/or Revisions to Specifications and Requirements

If a Proposer discovers any significant ambiguity, error, conflict, discrepancy, omission, or other deficiency in this RFP, the Proposer should immediately notify the individual named below of such error and request modification or clarification of the RFP document.

Any questions, exceptions, or additions concerning the subject matter of the RFP document(s) shall not be considered unless submitted via e-mail (no phone calls) on or before 11:59 p.m. Central Time (CT) on the applicable dates specified in Section 1.10, Calendar of Events, to Jim Witecha at James.Witecha@wisconsin.gov.

In the event that it becomes necessary to provide additional clarifying data or information, or to revise any part of this RFP, supplements or revisions will be provided to all Proposers.

1.6 Contact with State Personnel

From the date of release of this RFP until a notice of intent to award the Contract is issued, all contacts with State employees, and other personnel performing official business for the State under contract, regarding this RFP shall be made through Jim Witecha. Contact with other State personnel regarding this RFP is not permitted during the procurement process and violation of these conditions may be considered sufficient cause for automatic rejection of a Proposal.

1.7 News Releases

News releases pertaining to the RFP or to the acceptance, rejection, or evaluation of Proposals shall not be made without the prior written approval of the State.

1.8 Proposer Conference and Site Visit

A proposer conference will not be conducted.

1.9 Reasonable Accommodations

The State will provide reasonable accommodations, including the provision of informational material in an alternative format, for individuals with disabilities upon request. If you need accommodations, contact Jim Witecha at James.Witecha@wisconsin.gov.

1.10 Calendar of Events

Listed below are important dates and times by which actions related to this RFP shall be completed. In the event that the State finds it necessary to change any of these dates and times it will do so by issuing a supplement to this RFP.

DATE	EVENT
06-13-2016	Date of issue of the RFP
06-23-2016	Due date for first round of written questions
06-28-2016	Written answers posted (target)
07-05-2016	Due date for second round of written questions
07-11-2016	Written answers posted (target)
08-01-2016	Proposals due
N/A	Demos by invited Proposers or on-site visits by evaluation committee
09-09-2016	Notification of intent to award sent to Proposers (target)
10-07-2016	Contract start date (target)

1.11 Contract Term

The Contract term will be three (3) years (Initial Term) with two (2) one-year renewal terms upon mutual written agreement.

1.12 Incurring Costs

The State of Wisconsin is not liable for any cost incurred by a Proposer in the process of responding to this RFP.

1.13 No Obligation to Contract

The State reserves the right to cancel this RFP for any reason prior to the issuance of a notice of intent to award. The State does not guarantee the purchase of any specific quantity or dollar amount. Proposals that stipulate that the State shall guarantee a specific quantity or dollar amount will be disqualified.

1.14 Retention of Rights

The State retains the right to accept or reject any or all Proposals if deemed to be in its best interest.

All Proposals become the property of DOA upon receipt. All rights, title, and interest in all materials and ideas prepared by the Proposer for the Proposal to DOA shall be the exclusive property of DOA and may be used by the State at its option.

1.15 Eligible Contract Users

In addition to the Agency as identified in this RFP, resulting Contract(s) may also be utilized by other State agencies not otherwise covered by the Procuring Agency; University of Wisconsin-System campuses; municipalities as defined in s. 16.70(8), Wis. Stats.; and other states to the extent their applicable laws allow. Prior to the use of such Contract(s) by these entities, Contractor will notify the Contract Administrator to ensure, among other things, that the Contract(s) will not adversely impact the enterprise services.

2.0 PREPARING AND SUBMITTING A PROPOSAL

2.1 General Instructions

The evaluation and selection of a Proposer will be based on the information submitted in the Proposal plus references, and any on-site visits or best and final offers (BAFOs) where requested. Failure to respond to each of the requirements in the RFP may be the basis for rejecting a response.

Proposals in each category will be construed by the State as separate Proposals with the exception of the consideration of the award for a Bundled Proposal.

Proposers may submit Proposal(s) in response to one or more categories. Proposers submitting a Bundled Proposal will only be considered if all requirements in all categories are met.

2.2 Submitting a Proposal

Proposers shall submit **one (1) hard copy original** marked “original”, **six (6) exact hard copies** and **one (1) electronic version** of all files via USB drive or CD.

Proposers shall also submit **one (1) hard copy original**, marked “original” in a separately sealed envelope and **one (1) electronic copy of the Cost Proposal saved as a separate file from the other Proposal documents on the USB Drive or CD**. Alternately, the Cost Proposal may be saved separately on a second USB drive or CD submitted with the Proposal package.

No mention of the cost proposal is permissible in the response to any other section of this Request for Proposal.

All materials required for acceptance of the Proposal by the deadline must be sent to:

USPS ADDRESS

Jim Witecha, RFP Manager
State Bureau of Procurement
Wisconsin Department of Administration
PO Box 7867
Madison, Wisconsin 53707-7867

COMMON CARRIER ADDRESS

Jim Witecha, RFP Manager
State Bureau of Procurement
Wisconsin Department of Administration
101 East Wilson Street, 6th Floor
Madison, Wisconsin 53703-3405

Proposals shall be received by the above office no later than 2:00p.m. CT on **August 1, 2016**. All Proposals shall be date and time-stamped in by the State Bureau of Procurement Office on or prior to the stated opening date and time. Proposals not so stamped will be considered late. **Late Proposals will not be evaluated and shall be returned to the Proposer unopened.**

Receipt of a Proposal by the State mail system does not constitute receipt of a Proposal by the State Bureau of Procurement for purposes of this RFP.

All Proposals shall show the following information on the outside of the package:

- Proposer's (Company) Name and Address
- RFP Title
- RFP Number
- Name of Procurement Manager
- RFP Due Date and Time

2.3 Proposal Organization and Format

Proposers responding to this RFP must comply with the following format requirements. The State reserves the right to exclude any responses from consideration that do not follow the required format as instructed below.

Proposals shall be organized and presented in the order and by the numbers assigned in the RFP with each heading and subheading, separated by tabs or otherwise clearly marked.

Tab 1 - Table of Contents

Provide a table of contents for the Proposal.

Tab 2 - RFP Cover Sheet

Complete and sign the Cover Sheet (DOA-3261 (R05/2014)).

Tab 3 - Transmittal Letter

The transmittal letter must be written on the Proposer's official business stationery and signed by an official authorized to legally bind the Proposer. Include in the letter:

1. Name and title of Proposer representative;
2. Name and address of company;
3. Telephone number, fax number, and email address;
4. RFP number and title;
5. An itemization of all materials and enclosures submitted in response to the RFP;
6. A confirmation that all RFP amendments have been reviewed by the Proposer; if none have been posted, include a statement to that effect;
7. A statement that the Proposer believes its Proposal meets all the requirements set forth in the RFP;
8. A statement indicating that the Proposer understands and agrees that it has an affirmative duty to inquire about and seek clarification of any question or other item in the RFP that Proposer does not fully understand or that Proposer reasonably believes is susceptible to more than one interpretation;
9. A statement that the Proposer's organization or an agent of the Proposer's organization has arrived at the prices and discounts without consultation, communication, or agreement with any other respondent, or with any competitor for the purpose of restricting competition;
10. A statement that the prices, discounts, or margins quoted in the response have not been knowingly disclosed by the Proposer's organization, or by any agent of the Proposer's organization, and will not be knowingly disclosed by same, directly or indirectly, to any other respondent or to any competitor;
11. A statement that no attempt has been made or will be made by the Proposer's organization or by any agent of the Proposer's organization to induce any other person or firm to submit or not to submit a response for the purpose of restricting competition;
12. A statement acknowledging the Proposal conforms to all rights of the State including procurement rules and procedures articulated in this RFP, all rights terms and conditions specified in this RFP;
13. A statement acknowledging that the Proposer agrees to adhere to all terms and conditions of this RFP;
14. A statement that the individual signing the Proposal is authorized to make decisions as to the prices quoted, and that she/he has not participated, and will not participate in, any action contrary to the RFP;
15. A statement of the Proposer's assurance the Proposal will remain in full force and effect for at least one hundred eighty (180) days from the Proposal due date;
16. A statement that the Proposer is an expert in the types of systems, functions, and tasks proposed and understands that the State will be relying on this expertise; and
17. A statement that the Proposer will be making a number of representations outside of its formal Proposal document in possible discussions, presentations, negotiations, demonstrations, sales or reference material, and other information-providing interactions and as such hereby warrants that the State can rely on these as inducements into any subsequent contract, and be made a part thereof.

Tab 4 - Response to Mandatory Requirements

Provide a point-by-point response to each requirement specified in Sections 4.1-4.2 of this RFP using Appendix E: Mandatory Requirements Response Matrix. Responses that fail to meet the mandatory requirements shall be rejected.

Tab 5- Response to General Requirements

Provide a point-by-point response to each requirement specified in Section 4.3 of this RFP. Responses to requirements must be in the same sequence and numbered as they appear in this RFP.

Tab 6 - Response to Technical Requirements

Provide a point-by-point response to each requirement specified in Section 5 of this RFP. Responses to requirements must be in the same sequence and numbered as they appear in this RFP.

Tab 7 - Response to Value Added Capabilities

Provide a point-by-point response to each requirement specified in Section 6 of this RFP. Responses to requirements must be in the same sequence and numbered as they appear in this RFP.

Tab 8 – Terms and Conditions

Appendix C: Contract, provided as an attachment to this RFP, represents the terms and conditions which the State expects to execute in a Contract with the successful Proposer. Proposers must accept or submit point-by-point exceptions along with proposed alternative or additional language for each point. The State may or may not consider any of the Proposer’s suggested revisions. Any changes or amendment to any of the contract terms and conditions will occur only if the change is in the best interest of the State. Proposers may not submit their own contract document as a substitute for these terms and conditions.

Tab 9 – Required Forms

Include here the completed forms required in the RFP.

Form Number/Name	Location
DOA-3261: RFP Cover Sheet	Separately attached to VendorNet cover page; Include in Tab 2
DOA-3027: Designation of Confidential and Proprietary Information	Separately attached to VendorNet cover page
DOA-3477: Vendor Information	Separately attached to VendorNet cover page
DOA-3478: Vendor Reference	Separately attached to VendorNet cover page
DOA-3333: Vendor Agreement-Cooperative Purchasing	Separately attached to VendorNet cover page
Applicable Proposal Checklist	Separately attached to VendorNet cover page

Under Separate Cover - Cost Proposal Information

Provide all cost information on Appendix A: Cost Sheets according to the instructions provided. Include all costs for furnishing the product(s) and/or service(s) included in this Proposal. Identify all assumptions on the “Pricing Assumptions” tab. Failure to provide any requested information in the prescribed format may result in disqualification of the Proposal.

No mention of the cost proposal is permissible in the response to any other section of this Request for Proposal.

2.4 Multiple Proposals

Multiple Proposals from a Proposer will be permissible; however, each Proposal must conform fully to the requirements for proposal submission. Each such Proposal must be submitted separately and labeled as Proposal #1, Proposal #2, etc., on each page included in the response.

If a Proposal is submitted by a joint venture or similar partnership of Proposers for consideration as a Bundled Proposal, the individual Proposers must submit Proposals in response to individual categories if they intend to be considered for award of such individual categories in the event of an unbundled award.

2.5 Withdrawal of Proposals

Proposals shall be irrevocable until contract award unless the Proposal is withdrawn. Proposers may withdraw a Proposal in writing at any time up to the proposal closing date and time if received by the RFP manager. To accomplish this, the written request must be signed by an authorized representative of the Proposer and submitted to the RFP manager. If a previously submitted Proposal is withdrawn before the proposal due date and time, the Proposer may submit another Proposal at any time up to the proposal closing date and time.

3.0 EVALUATION AND CONTRACT AWARD

3.1 Preliminary Evaluation

The Proposals will first be reviewed to determine if they contain the required forms, meet the submittal instructions and meet all mandatory requirements. Failure to meet mandatory requirements will result in Proposal rejection. In the event that no Proposer meets a specified requirement(s), the State reserves the right to continue the evaluation of the Proposals and to select the Proposal most closely meeting the requirements specified in this RFP.

3.2 Proposal Scoring

Accepted Proposals will be reviewed by an evaluation team and scored against the stated criteria. A Proposer may not contact any member of an evaluation team except at the State's direction. Proposals from certified Minority Business Enterprises (MBE) and/or Disabled Veteran Owned Businesses (DVB) may have points weighted by a factor of 1.00 to 1.05 to provide up to a five percent (5%) preference to these businesses (s. 16.75 (3m), Wis. Stats., 2001-02). The evaluation team's scoring shall be tabulated and Proposals ranked based on numerical scores received.

Should the State conduct any oral presentations or demonstrations, the evaluation team will review the initial scoring and make adjustments based on the information obtained in the oral presentation or demonstration, site visits, and reference checks to determine final scoring.

3.3 Evaluation Criteria

The Proposals will be scored using the following criteria:

Category 1: IT Service Desk Call Center

<u>Description</u>	<u>Points</u>	<u>Weight (%)</u>
General Requirements	2500	50%
Technical Requirements	900	18%
Cost	1600	32%
Total	5000	100%

Category 2: IT Desktop Services

<u>Description</u>	<u>Points</u>	<u>Weight (%)</u>
General Requirements	200	20%
Technical Requirements	500	50%
Cost	300	30%
Total	1000	100%

Results of reference checks will be used to clarify and substantiate information in the written Proposals. The reference results shall then be considered when scoring the responses to the general and technical requirements in the RFP.

The points stated above are the maximum amount awarded for each category. Evaluation guidelines have been established for each of these sections.

The lowest cost Proposal will receive the maximum number of points available for the cost category. Other cost proposals will receive prorated scores based on the proportion that each of the costs of the Proposals vary from the lowest cost Proposal.

3.3.1 Evaluation of Bundled Proposals

If a Bundled Proposal is submitted, the Proposer must also submit a responsive Proposal to both individual Categories 1 and 2.

There are no unique general or technical requirements applicable to Bundled Proposals. All such requirements are identified in the individual category sections and the Proposer must respond to all of them. The only component that will distinguish a Bundled Proposal from individual category Proposals is the scored cost component.

The cost section of each Bundle option is weighted as follows:

<u>Bundled Cost Proposal</u>	<u>Points</u>	<u>Percent</u>
Lowest Net Cost		
TOTAL	1900	100%

3.4 Proposer Presentations

The top scoring Proposer(s), based on an evaluation of the written Proposal(s), may be required to participate in demonstrations and/or site visits to support and clarify their Proposals if requested by the State. The State will make every reasonable attempt to schedule each presentation at a time and location agreeable to the Proposer. Failure of a Proposer to interview or permit a site visit on the date scheduled may result in rejection of the Proposer's Proposal.

3.5 Award and Final Offers

Award(s) may be made either as a Bundled award or unbundled (per category) based on the highest scoring (general, technical, and cost) Proposal(s) and consideration of the State's best interests. That State also reserves the right to award within only Category 1, or only Category 2, as determined by the State's best interests.

The State will compile the final scores for all sections of each responsive Proposal. The award will be granted in one of two ways. The award may be granted to the highest scoring responsive and responsible Proposer in each category. Alternatively, the highest scoring Proposer or Proposers may be requested to submit final and best offers. If final and best offers are requested by the State and submitted by the Proposer, they will be evaluated against the stated criteria, scored and ranked by the evaluation committee. However, a Proposer should not expect that the State will request a final and best offer.

The award may be granted to the highest scoring responsive and responsible Proposer(s) as determined by the solution that results in the highest cumulative point total.

If the Bundled method of award is used, the Contractor will be responsible for all categories awarded.

The State reserves the right to award to one, or more than one Proposer, as determined by the State's best interests. The State is the sole determinant of its best interests.

3.6 Offer in Effect for 180 Days

A Proposal may not be modified, withdrawn, or canceled by the Proposer for a 180-day period following the deadline for proposal submission as defined in the Calendar of Events, or receipt of best and final offer, if required, and Proposer so agrees in submitting the Proposal.

3.7 Notification of Intent to Award

Proposers will be notified in writing of the State's intent to award the contract resulting from this RFP. After the notice is issued, copies of all Proposals will be available for public inspection from 8:00am to 4:00pm at 101 East Wilson Street, Madison, Wisconsin, under the supervision of DOA/SBOP staff. Proposers should schedule a specific appointment with Jim Witecha via e-mail (James.Witecha@wisconsin.gov) to ensure that space is available for the review.

3.8 Right to Reject Proposals and Negotiate Contract Terms

The State reserves the right to negotiate the terms of the contract, including the award amount, with the selected Proposer prior to entering into a contract. If a Contract between the Agency and the successful Proposer cannot be executed by both parties within thirty (30) days after the notice of intent to award the Contract (or the conclusion of an appeal of the award per Section 3.9, whichever is later), the State may choose to cancel the first award and commence negotiations with the next highest scoring Proposer.

3.9 Appeals Process

The appeals procedure applies to only those requests for bids and proposals for services that are over \$50,000. Notices of intent to protest and protests must be made in writing. Protestors should make their protests as specific as possible and should identify statutes and Wisconsin Administrative Code provisions that are alleged to have been violated.

The written notice of intent to protest the intended contract award must be filed with:

USPS ADDRESS

Rick Hughes
Wisconsin Department of Administration
State Bureau of Procurement
P.O. 7867
Madison, Wisconsin 53707-7867

COMMON CARRIER ADDRESS

Rick Hughes
Wisconsin Department of Administration
State Bureau of Procurement, 6th Floor
101 East Wilson Street
Madison, Wisconsin 53703-3405

and received in his office no later than five (5) working days after the notice of intent to award is issued. The written protest must be received in Mr. Hughes' office no later than ten (10) working days after the notice of intent to award is issued.

The decision of the head of the procuring agency may be appealed to the Secretary of the Department of Administration within five (5) working days of issuance, with a copy of such appeal filed with the procuring agency; provided the appeal alleges a violation of a statute or a provision of a Wisconsin Administrative Code.

4.0 GENERAL PROPOSAL REQUIREMENTS

The following requirements in Sections 4.1- 4.2 are mandatory and the Proposer must satisfy them at no additional cost to the State. Responses to each requirement in Sections 4.1-4.2 must indicate that, "Yes", the Proposer does comply with the requirement or "No", Proposer does not comply, using Appendix E: Mandatory Requirements Response Matrix. No explanation is required, as non-compliance with any of the following requirements will result in Proposal rejection and remove that Proposal from further consideration. However, if a Proposer is not submitting a Bundled Proposal, then no responses are required in Appendix E for the inapplicable category (e.g. 4.1.2 – Category 1 only; 4.1.3 – Category 2 only).

In the event there is an individual mandatory requirement that no Proposer is able to meet, the State reserves the right to eliminate that individual mandatory requirement; in such case, the State shall continue the evaluation of

Proposals and select the Proposal that most closely meets the remaining requirements specified in the RFP. All mandatory requirements are minimums unless otherwise stated.

4.1 Mandatory Proposer Qualifications: Categories 1 and 2

4.1.1 Managed Services Applicable to IT ESD and Managed Desktop Support Solutions:

- 4.1.1.1 Proposer must have a minimum of 3 years' experience providing managed service solutions to three (3) or more customers (public or private sector), each with at least 10,000 end users.
- 4.1.1.2 Proposer must provide staff with basic training (and/or will receive training from the Contractor prior to the start of their work on the Contract) in:
 - 4.1.1.2.1 Customer relationship techniques.
 - 4.1.1.2.2 The Agency's current releases of all desktop products and support procedures, as well as the basic infrastructure of, and technology used by, the State of Wisconsin and its customers.
- 4.1.1.3 Proposer must possess a remote desktop access tool for use in aiding Customers with technical problems.
- 4.1.1.4 Proposer agrees that any work products developed as part of the Contract (*e.g.* all written reports, drafts, presentations, and meeting materials, etc.) must remain the property of the State.
- 4.1.1.5 Proposer must provide staff with at least one (1) year of experience to coordinate the planning, implementation and on-going delivery of the specified services. This includes but is not limited to project planning, work-flow development, reports, and documentation attesting to the delivery of services at the prescribed service levels.
- 4.1.1.6 Proposer must conduct ongoing training for staff after the initial "train the trainer" training provided to Proposer by the Agency. Final responsibility for ensuring satisfactory job performance rests with the Proposer.
- 4.1.1.7 Proposer must obtain, at Proposers' expense, criminal arrest and conviction records from the Wisconsin Department of Justice and a full set of fingerprints for each individual assigned to this Contract. Proposer must screen prospective employees and assigned resources according to [ss.111.335, Wis. Stats.](#)
- 4.1.1.8 Proposer must ensure that information and system security controls outlined in [NIST Special Publication 800-53](#), "Security and Privacy Controls for Federal Information Systems and Organizations" are adhered to.
 - 4.1.1.8.1 The Contractor will be required to go through a security awareness training program developed by the State of Wisconsin.
- 4.1.1.9 All service desk agents and desktop support staff must clearly communicate and be proficient in English.

- 4.1.1.10 Proposer must correlate and analyze incidents in order to identify either an Agency or an Enterprise Event.
- 4.1.1.11 Proposer must have achieved with previous clients, and maintain with the State of Wisconsin, a high satisfaction rating based upon customer satisfaction surveys. Ex: scores of > 4 on a scale of 0 to 5.
- 4.1.1.12 The Proposer must have the ability to create or change voicemail prompts, update the State of Wisconsin's customer portal, and create a crisis message in the phone system. The Proposer must also have the ability to send out automatic warning messages and updates to staff when appropriate.
- 4.1.1.13 All services must be provided from a United States-based Proposer site, and select services must be provided at the Agency's location in downtown Madison, WI. At a minimum, Proposers are expected to attend the following:
 - Initial kick-off meeting with the Agency's project team.
 - Monthly status meetings (or more often if the Agency requests).

4.1.2 Category 1: IT ESD Call Center Only

- 4.1.2.1 Proposer must have the capacity to respond to a minimum average of 13,000 (combined phone, email, chat, and monitoring) contacts each month, 365x24x7, including the necessary supervisory and management support.
- 4.1.2.2 Proposer must provide comprehensive call tracking and trend analysis statistics as requested via an Automatic Call Distribution (ACD) system or similar solution with the ability to pull data that includes the number of Calls received, number of Calls not answered, Calls abandoned, average answer time, average talk time, average hold time, average Call wait time, and number of outgoing Calls. Proposers will be required to provide weekly, monthly, quarterly, and annual metrics dashboards and reports.
- 4.1.2.3 Proposer must respond to contacts in a manner that meets or exceeds current service levels for an IT ESD. Current service levels include, but are not limited to, the following averages which are measured monthly (All Times Listed in Minutes:Seconds):
 - Calls Average Speed of Answer – 1:10
 - Calls Average Handling Time – 5:50
 - Calls Average Abandon Rate – less than 7%
 - Calls Overall Service Performance Level of 70%
 - Emails Average Speed of Answer for – 2:40
 - Emails Average Handling Time – 5:20
 - Emails Overall Service Performance Level of 85%
 - The State of Wisconsin reserves the right to establish chat service levels.
 - Failure to meet or exceed the current service levels provided in this Section 4.1.2.3 will result in the Agency reducing its scheduled ESD payment for the impacted month in accordance with the provisions of Section 62.1; IT ESD Call Center SLA of Appendix C: Contract.

4.1.3 Category 2: IT Desktop Managed Support Services Only

- 4.1.3.1 Proposer must have the capacity to respond to, and provide support for, at least 2,200 end users on a monthly basis, as well as respond to an average of 1,600 (combined phone, email, chat, and monitoring) contacts each month, from 7:00 AM – 5:00 PM CT Monday – Friday excluding State Holidays, including the necessary supervisory and management support.
- 4.1.3.2 Proposer must have a minimum of one (1) year in the business of consulting with customers and technical hardware/software repair personnel for the purpose of resolving hardware and software problems for customers.
- 4.1.3.3 Proposer must have a minimum of one (1) year in the business of providing purchasing-related assistance including:
 - Lifecycle replacement and management of hardware and software.
 - Assistance with hardware and software requests including maintenance of enterprise hardware specifications with research useful for recommendations and options.
- 4.1.3.4 Proposer must have a minimum of one (1) year in the business of providing device support including break fix services for desktop, laptop, mobile device, smart phone, IP phones, audio visual devices, office equipment such as fax machines, copiers, and printers along with the maintenance of an inclusive knowledge base of common resolution techniques for each to include Windows and iOS support.
- 4.1.3.5 Proposer must respond to contacts in a manner that meets or exceeds current service levels for an IT desktop services solution provider. Current service levels include but are not limited to the following averages which are measured monthly (All Times Listed in Minutes:Seconds):
 - Calls Average Speed of Answer – 0:30
 - Calls Average Handling Time – 5:50
 - Calls Average Abandon Rate – less than 7%
 - Calls Overall Service Performance Level of 90%
 - Emails Average Speed of Answer for – 2:40
 - Emails Average Handling Time – 5:20
 - Emails Overall Service Performance Level of 85%
 - The State of Wisconsin reserves the right to establish chat service levels.
 - Failure to meet or exceed the current service levels provided in this Section 4.1.3.5 will result in the Agency reducing its scheduled ESD payment for the impacted month in accordance with the provisions of Section 62.2; IT Desktop Managed Support Services SLA of Appendix C: Contract.

4.2 Mandatory Contract Performance Requirements

- 4.2.1 Within thirty (30) calendar days of Contract award, Proposer must provide a draft work plan to the Agency that includes the chronological outline of all activities to be performed during the on-boarding phase including key timelines, deliverables, and parties responsible.
- 4.2.2 Proposer must provide prompt (within 24 hours) and ongoing communication with the Agency's project management team and provide advice, consultation, and written opinions/recommendations as needed.

- 4.2.3 Proposer must provide reports as requested, delivered remotely via teleconference or on site at Agency facilities. These include, but are not limited to usage, service level metrics, etc.
- 4.2.4 In consultation with, and contingent upon the ultimate approval of the Agency, Contractor will conduct Customer/user satisfaction surveys to identify and act upon service improvement opportunities. The Agency shall determine, based on the Contractor's survey and scoring methodology, what constitutes a satisfactory level of service to the Customer. No less than 10% of all Customers making contact with Contractor by any means will be randomly surveyed.
- 4.2.5 Contractor shall triage reported problems and record all information with complete and accurate descriptions.
- 4.2.6 Contractor must adhere to agreed-upon escalation and communication of status processes for every contact or planned/unplanned event.
- 4.2.7 Contractor must accurately route tickets to the appropriate queues via Cherwell or State preferred ITSM functionality.
- 4.2.8 Contractor must adhere to the agreed-upon communication strategies to keep Customers current regarding impending changes or scheduled outages, etc.
- 4.2.9 Contractor must adhere to all applicable ITIL standards.

4.3 General Requirements

The purpose of this section is to provide the State with a basis for determining a Proposer's capability to undertake this Contract. Responses to Section 4.3 will be scored.

4.3.1 Organizational Capabilities: Categories 1 and 2

- 4.3.1.1 Describe your organization's experience and capabilities providing similar services to those being requested and for which you are proposing. Include details of at least one (1) specific project, including dates and results of that engagement, where similar services were performed.
- 4.3.1.2 Describe your company's areas of service expertise. What makes your company an expert, and how do you differentiate yourself in the market?
- 4.3.1.3 Elaborate on your company's ability to provide management and supervisory personnel to oversee the performance of IT service desk call center and/or IT desktop service functions as described.
- 4.3.1.4 Provide an organizational chart for your company and include a contractual issue escalation process used to resolve any potential issues between the State and the Proposer during the Contract.
- 4.3.1.5 Describe Proposer's experience meeting or exceeding SLAs similar to those identified in this RFP. Provide at least one (1) current service level agreement your company has with another similar customer.

- 4.3.1.6 Describe your company's experience and ability to act as a managing agent, with responsibility for enabling, monitoring and enforcing compliance to client requirements and contractual agreements.
- 4.3.1.7 Describe the manner in which ongoing end user account ticket management will be handled and how ticket management contributes to the development of a knowledge base.
- 4.3.1.8 Proposer's service network must provide statewide coverage for all 72 counties in Wisconsin. Provide a map, or other supporting documentation such as a location listing, to demonstrate the ability to meet this coverage requirement, and include response time details for each location.
- 4.3.1.9 Proposer must provide a description of any proposed policies and procedures for maintaining the security and confidentiality of State of Wisconsin information. Provide a detailed description of how the vendor has implemented and maintains compliance with HIPAA, FTI, CJIS, and other security standards. The State of Wisconsin reserves the right to review any such policy in full.
 - 4.3.1.9.1 The awarded Proposer will be required to sign the State of Wisconsin's Confidentiality Agreement.

Scalability

The State requires a service solution that is scalable to meet changing needs and innovation in service delivery models and technologies. Further, the State requires the services of a vendor that can support a fluid, mixed-device end-user computing environment of thin and thick devices, mobile and fixed devices, virtual and full desktops, etc.

- 4.3.1.10 Describe how your firm envisions the implementation of changes to processes or procedures being handled, including the expansion of service delivery and/or volume. Provide at least one (1) example of where you have effectively implemented a change with another client while still adhering to service level agreements
- 4.3.1.11 Describe your firm's ability to keep pace with changing device support needs of your customers.

4.3.2 Staffing Qualifications: Categories 1 and 2

- 4.3.2.1 Identify and provide a resume for the Project Manager(s) that will be assigned to this project (and any additional projects they will be involved in during the Contract). The Project Manager(s) will be the primary point of contact for the Agency and must be available on an as-needed basis. Describe how the Proposer's Project Manager(s) will guarantee availability to the Agency during the entire duration of the project.
- 4.3.2.2 Describe your organization's process for hiring and training IT service desk call center and/or desktop support technical staff and include your training verification process to determine when staff is prepared to handle customer contacts.
- 4.3.2.3 Describe the work force management tool currently used to provide these services.
- 4.3.2.4 Provide the annual average turnover rates for IT service desk call center agents and desktop support staff over the past 2 years.

- 4.3.2.5 Provide a sample job description for your IT service desk call center and/or desktop technical lead/engineer staff and supervisory/management staff. Attach a sample resume for each and give at least one (1) example of a project where the staff provided similar services to an organization with needs comparable to those described in this RFP.
- 4.3.2.6 Describe supervisory personnel ratio to staff personnel during prime support and non-prime support hours. These supervisory personnel will ensure that staff follows Agency policies and procedures.

Dedicated Resources

The State needs dedicated resources to support change management, problem management (e.g. expediter) and service request/incident management.

- 4.3.2.7 Describe the personnel resources your firm will dedicate to the Contract and/or, if these resources are not yet identified, the qualifications your firm requires of candidates for those positions.

4.3.3 Implementation Planning and Execution: Categories 1 and 2

- 4.3.3.1 Describe the resources provided by your firm, and what resources would be required from the State of Wisconsin, to implement a complete IT service desk call center and/or IT desktop support service offering for the Agency's current functions. Provide a sample roles and responsibilities document, describing the roles that Proposer sees the firm playing as well as the roles Proposer sees the Agency playing related to start up implementation, maintenance, and support of your solution.
- 4.3.3.2 Provide a sample high level project engagement plan that was used from Proposer's prior engagements including:
- Project management approach and project methodology.
 - Draft implementation plan and schedule, identifying deliverables, major tasks, and project completion dates based on resources needed to implement the IT services desk call center and IT desktop.
 - Change management steps and recommendations.
- 4.3.3.3 Describe your current customer support organization and capabilities. Include descriptions of incident response policies, how incidents are reported by your customers, incident prioritization methods, and resolution/disposition goals. Describe your current escalation processes/programs.
- 4.3.3.4 Describe and demonstrate how you use knowledge base management as part of your triage activities. Please include the knowledge base feed options offered to your customers. How are the requirements of applicable ITIL standards incorporated and enforced in these processes?
- 4.3.3.5 Describe the tool(s) your firm uses for ITSM, and if your primary tool is not Cherwell, describe how your solution would integrate with Cherwell.
- 4.3.3.6 Describe how you manage your client relationships.
- 4.3.3.7 Describe your client satisfaction measurement process. Include information on how your organization uses this information to address and resolve problems.

- 4.3.3.8 Describe your customer satisfaction results over the past 18-24 months.
- 4.3.3.9 What methodologies do you use for continuous improvement?
- 4.3.3.10 The State needs more and better data related to help desk and desktop support incidents to manage the business needs of our Customers. Identify the standard and customizable dashboard reports offered by your solution. What are the business intelligence (BI) and reporting tools used by your firm to provide service to your customers?
- 4.3.3.11 How do you monitor the quality of service provided? What steps are taken to document and rectify identified issues – client identified as well as self (Proposer) identified?
- 4.3.3.12 Describe your standard process for driving non-urgent Calls to resolution (*e.g.* warm transfer, escalations, follow up, agent/ticket ownership, etc.)
- 4.3.3.13 Describe the various methodologies that you adhere to for service delivery.
- 4.3.3.14 Do you record Calls? If so do you make them available to the customer, and what is your retention policy?

4.4 Proposer References

Using form DOA-3478, provide a list of at least three (3) clients or organizations the Proposer has done business with (similar to that required by this solicitation) within the last five (5) years. For each, include the requisite information on DOA-3478 and also provide:

- Project start/end dates
- Date solution was operational in production environment
- Project description
- Project cost (implementation services/operational services) and Proposer investment
- Outcome of project (*i.e.* on time, on budget, and met customer needs)
- Scope of work performed
- Staff that worked on the project, including their roles and responsibilities
- Technical environment

5.0 TECHNICAL REQUIREMENTS

For the following sections, and considering the State’s mission, objectives, challenges, and broader vision as identified in this RFP and its attachments, Proposer shall:

- Generally describe the approach and methodology used to accomplish the specific work and functions.
- Describe how the approach will best accomplish the State’s objectives as described in this RFP.

5.1 Interaction Management and Facilities Category 1 IT Service Desk Call Center

- 5.1.1 Describe your Automatic Call Distribution (ACD) system tool, and how it integrates with your ITSM tool.

- 5.1.2 Technical components on the agent desktop that are required to perform the agent duties include at a minimum:
- Browser Technologies: Microsoft Internet Explorer 11 and higher, Firefox, and Chrome
 - Microsoft Word 2010 and higher
 - Microsoft Excel 2010 and higher
 - Microsoft Outlook 2010 and higher
 - Cherwell Service Management V 5.10
- 5.1.3 The ESD currently supports all Java versions newer than 1.5. Discuss your ability to continue such support.
- 5.1.4 Describe the workstations, operating systems, virus-protection, and connectivity that will be used by staff to deliver the services required in this RFP, and how connectivity will be configured to accept the Clients and communication required.
- 5.1.5 Describe how you plan for and implement upgrades, fix pack releases, and/or minor and major release upgrades for internal systems that interface with State of Wisconsin systems. Provide a description of the release cycle, including how often upgrades are released. Describe the impact on contact handling that such releases/upgrades would have.
- 5.1.6 Describe your change control process and testing procedures that are conducted prior to changes being implemented.
- 5.1.7 Describe your process for receiving and handling phone Calls, voice mail messages, chat messaging, and email messages to deliver services required in this RFP. Include a description of any automatic call distribution (ACD) system being used to manage and route incoming Calls and messages.
- 5.1.8 Describe your process for forwarding email or chat messaging Interactions to a workgroup queue and assigning priority or routing rules to it based on information contained in the email, message, and/or your system.
- 5.1.9 Describe your process for forwarding phone Interactions to a workgroup queue and assigning priority or routing rules to it based on information entered by the customer and/or your system. Does your process allow customers to escape out of a workgroup queue or Interaction routing routine and leave a voicemail message without calling a second time?
- 5.1.10 Describe your process for informing the Agency and its Customers in the event of an outage, and convey how often status updates will be communicated.
- 5.1.11 Does your process allow the Agency to provide multiple and customizable announcements and music-on-hold that can be played concurrently within partitions? Can DOA supervisors record and activate announcements remotely if necessary?
- 5.1.12 Describe how your process captures real-time contact center data to demonstrate meeting SLAs contained within this RFP. Include a description of how this data is leveraged for dashboards and performance improvements.

5.2 Interaction Management and Facilities Category 2 Managed Service IT Desktop Function

5.2.1 Asset and Lifecycle Management

- 5.2.1.1 Describe your process and solution for lifecycle replacement and provide at least one example where this methodology produced proven process improvement results for a customer. Also include a description of your ability to:
- Track the age of each device and plan for replacement per budget requirements.
 - Track each asset and report proposed upgrades to management for review and approval.
 - After an upgrade is approved, build schedules and propose training to implement into the organization.
- 5.2.1.2 Describe your process and solution for hardware requests, and include a description of your ability to:
- Maintain a standard list of hardware specifications for the enterprise including standard/extended warranties.
 - Research hardware components to meet the needs of the business.
 - Transform research to hardware repair recommendations to review with Agency management to fill user requests.
 - Provide hardware/repair depots within regions and/or drop ship hardware to satisfy user hardware requests.
- 5.2.1.3 Describe your process and solution for software requests, and include a description of your ability to:
- Research and recommend software tools to review with Agency management to meet user requirements.
 - Transform research on license expirations to review with Agency management to handle bulk purchases and fill user requests.
 - Build and test pre-images to streamline and control deployments.

5.2.2 Desktop and Device Support

- 5.2.2.1 Describe your process for desktop and laptop support, and include a description of your ability to:
- Provide break fix services for desktop users that would include any hardware or software related issues.
 - Maintain a knowledge base of common resolution techniques that would interface with Proposer-specific troubleshooting steps.
 - Provide Windows and iOS support.
 - Resolve common desktop software issues (MS Office Products).
 - Resolve common printing/scanning issues.
 - Resolve common security/spam type issues.
- 5.2.2.2 Describe your process for mobile device support for remote users, and include a description of your ability to:
- Handle common hardware support Calls for Android, Windows, iOS, and Chrome.

- Manage and support State owned Smart Phones and IP Phones.
- Manage and support Bring Your Own Devices (BYOD).

- 5.2.2.3 Describe your process for video presentation and office equipment support, and include a description of your ability to:
- Assist with multimedia presentations at DOA.
 - Support office equipment; such as fax machines, copiers, and printers that are not covered under manufacturer warranty.
 - Support configurations for scanning to shared devices.

5.2.3 Desktop Engineering

Desktop Imaging and Application Packaging

The Proposer's resources would work with the DOA application architecture team to develop standard desktop images to deploy on any new equipment, or to restore corrupt equipment. For operating system planning and office document management, the Proposer's Level 2 service support team would work closely with the DOA engineering group.

- 5.2.3.1 Describe your process for desktop image management and support.
- 5.2.3.2 Describe your process for application packaging to develop new application deployments as needed by the organization.
- 5.2.3.3 Describe your process for application patching to approve and schedule regular software patches, security updates, and upgrades to OS and software applications.
- 5.2.3.4 Describe your process for new operating system planning.
- 5.2.3.5 Describe your process for office document management requiring file share and SharePoint interfaces.

5.2.4 Desktop Regression Testing

- 5.2.4.1 Describe resources, testing lab, and Proposer approach to regression test new patch releases to the organization.

5.2.5 Desktop Process Control

- 5.2.5.1 Describe your process for service requests and handling to route and manage service requests and incident tickets for user services.
- 5.2.5.2 Describe your process for reporting by defined categories so that management can assess success, stress points, customer perception of service, and improvement opportunities.

Integration with DOA, DET Purchasing

The Proposer resources would work with the existing procurement process workflow and DOA resources to obtain budget and management approvals for software and hardware purchases. Software installation processes would include at least bi-weekly reviews with the State, and Customer service reviews would be held at least on a semi-annual basis.

- 5.2.5.3 Describe your process for handling license management and version tracking for all software deployments. Description should include a workflow process to handle a software request and obtain approval before installation.
- 5.2.5.4 Describe your process for software installation where all software changes to the desktop would go through the Proposer's user service group. Description would include a workflow process to handle exceptions such as a user downloading software.
- 5.2.5.5 Describe your process for customer service team management and include escalation procedures in the event that immediate attention is needed for a business priority, as determined by the State.

5.2.6 Statewide Service Coverage

- 5.2.6.1 Describe how you will ensure consistent statewide coverage for support to dispatch, and what data is available to better regionalize the support and reduce the need to dispatch technicians for problems.
- 5.2.6.2 Describe your firm's current break/fix solution, including whether it includes regional parts depots, a drop/ship program, other services, or a combination. What strategies do you use to ensure the most efficient, economical method is used to support your customer?

5.3 Security Management, Auditing, and Compliance

Data Security and Auditability: The protection of all State data is of paramount, critical importance.

- 5.3.1 Describe the security controls in place to protect all levels of Customer data your staff will have access to in the provision of ESD and desktop services, and how you ensure that data is properly protected.
- 5.3.2 Describe how industry best practices and organizational security policies are incorporated into your solution.
- 5.3.3 Provide examples of monthly reporting tool(s) that serve as an audit trail and as a mechanism for monitoring the quantity and quality of the services being provided.
- 5.3.4 A critical objective of this Contract is to ensure State of Wisconsin Agencies and their Customers information assets are protected. Describe how your solution will protect the State's information assets. Provide at least one (1) example of how your solutions have protected the information assets of another organization of similar size and scope.
- 5.3.5 Provide detailed information on how your solution incorporates standards and meets compliance regulations provided by all of the following: Fed RAMP, FISMA, NIST, FIPS, CJIS, IRS, PCI, FERPA, and HIPPA, to include Network Access Control (NAC) and Multi-factor authentication method(s) as an example.
- 5.3.6 Describe how data shall be stored and secured. Include how data shall be securely transmitted, how the data shall be secured while offsite, how access to the data shall be controlled, how the resultant data shall be transmitted back to the Agency, and ultimately, how the offsite data shall be securely destroyed when use is completed.

- 5.3.7 Describe how your solution conducts proactive security assessments and how it responds to security incidents.
- 5.3.8 Describe your ability to provide IT service desk call center and/or IT desktop service functions while operating within applicable regulatory and security constraints. Provide a description of training required of contracted personnel in the area of information security.
- 5.3.9 Describe your physical plant security, and explain how data and equipment are secured within your facilities.
- 5.3.10 Provide a clear and functional emergency contingency communication and recovery plan that provides redundancy to continue services to Customers in the event of unplanned outages, natural disasters, fires, pandemics, etc. Include how this plan has been evaluated and tested.
- 5.3.11 Explain how you train employees on the emergency contingency and recovery plans and how frequently training is refreshed.

6.0 VALUE ADDED CAPABILITIES

If any of the value added capabilities discussed in this Section 6.0 result in additional costs beyond the per-Resolved Contact fees, use Appendix A: Cost Sheets to provide pricing for the services in the “Value Added Capabilities” tab.

- 6.1 Describe how your value added solution could expand to include mainframe monitoring functions.
- 6.2 Describe how your value added solution could expand to include Data Security Escorting Services and on-site monitoring.
- 6.3 Describe how your value added solutions could expand to include additional Category 1 and/or Category 2 options to what is needed today.
- 6.4 Describe your firm's experience providing consulting to a customer on innovation and strategic process improvement. Provide an example where the provision of these services resulted in demonstrated process efficiencies, improved service, and cost savings to the customer.
- 6.5 Describe your firm’s ability to address Contacts initiated through automated systems, such as monitoring systems which send alerts or any type of synchronization process between the State’s ITSM system and the proposers ITSM system.
- 6.6 The State currently purchases standard or extended warranty coverage when it purchases new devices. Warranty coverage may be up to 5 years to match our hardware replacement cycle. We are interested in exploring whether the provision of third party hardware repair through other supplier channels is more efficient and cost effective than the extended warranties that we are currently purchasing. Describe your current hardware repair program.

7.0 COST PROPOSAL

7.1 General Instructions for Preparing Cost Proposals

Proposer must use Appendix A: Cost Sheets to submit the cost proposal(s) as instructed in Section 2.3. Proposer is required to complete all mandatory fields on the cost sheet. Failure to properly complete the cost sheet as instructed will result in disqualification of the Proposal.

7.2 Cost Proposal for Category 1: IT Service Desk Call Center

The cost shall be all-inclusive and include all requisite hardware, software, licensing, maintenance, support, service charges, and ancillary charges related to service provisions (*e.g.* travel for on-site service and related expenses) and implementation. Proposer shall include additional costs (*e.g.* start up costs, transition fees, etc.) that have not already been included in the per-Resolved Contact price in the appropriate "Additional Costs" space, if any such costs exist.

Proposer must provide a per-Resolved Contact price based upon the total user count provided in Appendix D, and the average number of total monthly contacts found in Section 1.3 of the RFP, that will be charged during the Contract term. Each month, the per-Resolved Contact price will be multiplied by the total number of Resolved Contacts to determine the total monthly cost.

7.3 Cost Proposal for Category 2: IT Desktop Services

The cost shall be all-inclusive and include all requisite hardware, software, licensing, maintenance, support, service charges, and ancillary charges related to service provisions (*e.g.* travel for on-site service and related expenses) and implementation. Proposer shall include additional costs (*e.g.* start up costs, transition fees, etc.) that have not already been included in the per-Resolved Contact price in the appropriate "Additional Costs" space, if any such costs exist.

Proposer must provide a per-Resolved Contact price based upon the network diagram in Appendix B, the total user count provided in Appendix D, and the average number of total monthly contacts found in Section 1.3 of the RFP, that will be charged during the Contract term. Each month, the per-Resolved Contact price will be multiplied by the total number of Resolved Contacts to determine the total monthly cost.

7.4 Bundled Cost Proposal

The Proposer that intends to respond with a Bundled Proposal shall also submit a responsive Proposal to all categories included in Appendix A, including the cost sheets for the IT Service Desk Call Center and IT Desktop Services categories individually as instructed.

The bundled cost is a combination of the cost structures for both such categories, building in the value of the aggregated volume of business. Proposers must provide costs in the event that they are awarded together as one Contract.

7.5 Price Clarifications

The State reserves the right to clarify any pricing discrepancies related to assumptions on the part of the Proposers. Such clarifications will be solely to provide consistent assumptions from which an accurate cost comparison can be achieved.

7.6 Firm Pricing

Prices must remain firm for the initial Contract term. Prices established may be lowered due to general market conditions.

Discount percentages will remain fixed for the entire term of the Contract (*i.e.* Initial Term and all mutually agreed upon renewals). However, the State can always accept higher discounts (*i.e.* lower pricing).

7.7 Price Increase Requests

Price increase requests after the initial Contract term must be received by the Contract Administrator, in writing, at least thirty (30) calendar days prior to the beginning of the next Contract term for acceptance or rejection. Proposed

price increases are limited to once in a twelve (12) month period. Proposed price increases are limited to include only fully documented cost increases incurred by the Contractor. All documentation of Contractor's cost increases must be submitted with the price increase request. If the Contract Administrator deems cost increase documentation to be insufficient, he/she reserves the right to request further information. Any price increases that are not submitted with proper documentation or are deemed to be excessive may be rejected. Approval of price increases shall be made in the form of an amendment to the Contract.

7.8 New Products and Services

All pricing for new products, services, and applications proposed to be added during the term of the Contract is subject to negotiation with, and the approval of, the Contract Administrator. The approved price shall be considered a "not to exceed" price, meaning the State may pay less than but shall never pay more than that price.